

CASE STUDY:

The Preservation of Information with Sugar

How New York Restoration Project Leverages SugarCRM to Beautify Green Spaces.



New York Restoration Project (NYRP)
www.nyrp.org



New York Restoration Project (NYRP) is a non-profit organization driven by the conviction that all New Yorkers deserve beautiful, high-quality public space within walking distance of their homes. Founded in 1995 by acclaimed actress and singer-songwriter, Bette Midler, NYRP has planted trees, renovated gardens, restored parks, and transformed open space for communities throughout New York City. Today, NYRP manages about 100 acres of public park land and owns 52 community gardens throughout the city through a protected land trust.

Catherine Hall serves as the Senior Vice President and Chief Operating Officer and has been with New York Restoration Project for more than 20 years. She's seen it go from a staff of six to a team of up to 90 individuals working toward one common goal. UpCurve Cloud had the pleasure of working closely with Catherine to customize and implement Sugar to meet the needs of her small, but highly impactful non-profit organization.

Seeing the Forest for the Trees

Known as the city that never sleeps – New York City is one of the most faced-paced places in the world. Similarly, NYRP is constantly in motion, working with various municipal agencies, other small non-profits, and individual residents in the community to advance its mission. There is a wide-range of people and places the organization intersects with, lending to the complexity of its operations. NYRP wanted to find a way for its institutions to connect various activities happening within different departments, with a variety of people, and a broad spectrum of places. They also needed to institutionalize that knowledge in a way that served as a benefit – as opposed to a burden – to its staff.

For example, NYRP has a community garden in Crown Heights. This property has a community engagement team, an operations team, a capital team and an education team. Each of these teams has a different set of relationships and activities

Challenge

- New York Restoration Project (NYRP) manages 100 acres of public park land and owns 52 community gardens throughout NYC
- NYRP wanted a way to track the various activities happening at these different locations
- The organization was using legacy software and Excel spreadsheets that didn't meet its unique needs

simultaneously taking place for this one property. NYRP desired visibility into the intersection of people and place – both from a junior staff member's viewpoint and an executive staff member's perspective.



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Solution

- UpCurve Cloud worked with NYRP to implement and customize Sugar
- Under each account, NYRP tracks activities and relationships related to each park
- UpCurve Cloud's uMaps Sugar add-on allows NYRP to easily generate directions to their various work sites via an integration with Microsoft Bing Maps

Pruning the Weeds

More than 15 years ago, NYRP partnered with a group which was using a very complex outcomes and case management tool for nonprofits called Efforts to Outcomes (ETO). Through this partnership, NYRP was given an opportunity to use ETO to track its data. However, they quickly found that ETO was set up for a more traditional social services organization, and when they dug deeper into their database, they realized ETO wasn't keeping track of important data and relationships such as how many kids were enrolled in NYRP's education programs, how many plants were planted, or how many trees were in the ground. As the organization continued to evolve, ETO simply no longer met its needs.

NYRP then transitioned to storing its data via Excel spreadsheets. Inevitably, due to staff changes and organizational growth, data became increasingly difficult to find, couldn't be reported on and was lost over time. The leadership team at NYRP knew it was time for a better solution.

NYRP initially went back to the creators of ETO and they recommended another one of their products – Apricot – a more flexible case management and database software solution. NYRP also considered using Salesforce and several other CRMs on the market.

The NYRP team also performed extensive research and talked to each of their partners to find out what other non-profits of a similar scale – with an annual operating budget of around \$10 to \$12 million and a staff of 75 to 90 people – were using to manage their data. They found that organizations of similar scale typically went with off-the-shelf CRM systems, but NYRP doesn't store off-the-shelf kind of information.

Luckily, one of its non-profit partners suggested they look into Sugar. Catherine quickly contacted Sugar and a salesperson connected her with UpCurve Cloud for a demo of the product.

Taking Root

"Sugar was demonstrated to me in a very smart way. UpCurve Cloud looked at our website, took some of our information and built that into an example of how we could potentially utilize the

system. They met me where I was, and I liked the visual clarity they provided. I think it was a very good investment on the front end to show us what could be," said Catherine.

Once NYRP had a clear vision of how seamlessly Sugar could be customized to work for them, they were eager to get the implementation underway. It was a straightforward process with very few hiccups.

NYRP uses each Account record in Sugar to manage a different park property. Under each account, they track activities related to each park. Depending on the activity type selected within Sugar, NYRP has over 70 dependent fields that populate. This customization keeps the view streamlined for each user while still allowing them to collect and save as much relevant data as possible. For example, when going to the Central Park location to plant trees, users would select the activity type 'planting' and then all fields that were plant or tree related would appear. From there, it gets more granular, allowing them to specify that they planted oak trees, for example. This level of specificity allows NYRP to run detailed reports on its various activities, providing a new level of visibility for the entire organization.

Results

- NYRP can now run detailed reports on its various activities, providing a new level of visibility for the entire organization
- Sugar has also added tremendous value to NYRP in terms of efficiencies in decision making
- NYRP plans to double its number of Sugar licenses in the near future

Reaping the Harvest

Once the implementation was complete, NYRP deployed an internal group of early adopters to help spread the excitement about Sugar throughout the organization. They also solicited feedback from users, accepting suggestions on small tweaks that could make the system work even better for each department.

"People are now coming to me and saying, 'Oh why didn't you think about using it this way?' When it's their idea, that's what I consider a massive success because they are finding new ways to use data to advance our mission," said Catherine.

Sugar is helping NYRP to store all community volunteer inquiries and manage the approval process, while also documenting trash removal, trees planted, community outreach, and more – all for each specific location they own and/or manage. Sugar has also added tremendous value to NYRP in terms of efficiencies in decision making.



“Sugar was customized to use the same language we use when we write messages to each other or sit down to have internal operations meetings. This helped remove a lot of the initial fear from our staff and quickly increased our user adoption. We’re very happy with the outcome!”

Catherine Hall, Senior Vice President and Chief Operating Officer

Mapping Out a Clear Path

UpCurve Cloud also implemented a handy customization for NYRP called uMaps that allows NYRP to maintain latitude and longitude GPS coordinates and display map information. This is necessary to allow NYRP to designate which portion of a larger park or garden they are referring to in different records. This was major for NYRP as they often work in areas of parks that don’t have good cross streets to map to. UpCurve Cloud’s uMaps Sugar add-on allows them to manually enter a location, so they can pull it right up on a map and easily generate directions to their various work sites via an integration with Microsoft Bing Maps. “Sugar’s flexibility helps our staff in the field as much as it helps our staff in the office, it’s very adaptable to our unique needs,” said Catherine.

Branching Out

NYRP’s Sugar licenses and its implementation was funded by a private partner to help them get up and running. They’ve since reported back to that partner on how successful the project has been, prompting the partner to fund the organization for more information analysis to gather data on the impact of their work. As a result of their success, NYRP plans to request additional funding for more Sugar user licenses, as they would like to at least double their licenses in the near future.

Want to achieve results like NYRP?

Contact UpCurve Cloud for a customized demo of Sugar today!



Learn more at www.upcurvecloud.com